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2004
Field
Reviewer
Handbook

Museums
for
America

*For information, call
IMLS: (202) 606-8539
or e-mail: chenry@imls.gov,
rtrio@imls.gov, or
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I. The MFA Review Process

Thank you for offering to serve as a Museums for America (MFA) field reviewer. We have selected you to review this year's applications because of your expertise in museum operations, programs and activities. The staff at IMLS has prepared this handbook specifically for field reviewers. It will provide you with the technical information you need. Please use it in tandem with this year's *Museums for America Grant Application and Guidelines*. Even if you have reviewed for other IMLS programs, you should review this booklet since MFA is a new grant offering.

WHAT IS THE MUSEUMS FOR AMERICA GRANTS PROGRAM?

Museums for America will provide an opportunity for institutions to build their effectiveness in meeting their missions and furthering their strategic (i.e., institutional, long range, master) plans. Institutions will be able to use MFA funds to serve a wider and more diverse public through education, partnership, and behind-the-scenes activities. MFA grants are designed to be flexible. They can be used for ongoing museum activities; improvement of infrastructure; planning activities; new programs or activities; purchase of equipment or services; or other activities that will further the institution's commitment to one of the following strategic goals:

- Sustaining cultural heritage
- Supporting lifelong learning
- Serving as centers of community engagement

As a reviewer for Museum for America please be aware that these grant programs are designed to support high priorities for an institution. These proposals should advance the institution's mission and strategic goals. IMLS defines projects or programs in the **widest terms** possible. You have been selected to evaluate applications for one of the three categories. Although some applications may touch on all three goals, ultimately the project proposed should focus on the category indicated by the applicant.

STRATEGIC GOALS

SUSTAINING CULTURAL HERITAGE

This category supports all activities that museums undertake to sustain cultural heritage, including artistic, scientific, and historical artifacts and content. Collections care and management activities, research, scholarly and popular publications, and exhibit planning, design, and implementation are eligible for funding. Many of these projects will be focused on behind the scenes activities and have a target audience that is the staff.

Questions about any information in this booklet?

Contact the IMLS Program Office at (202) 606-8539 or by e-mail at chenry@imls.gov, rtrio@imls.gov, or kveline@imls.gov between 8:30 a.m. and 5:00 p.m. Eastern time, Monday through Friday.

SUPPORTING LIFE LONG LEARNING

This category encompasses the broadest scale possible of what museums provide as educational activities, including programs designed for youth, families, or adults, exhibits, Web site content and design, and publications. The means by which museums share their collections, content, and knowledge to support learning are eligible for funding.

SERVING AS CENTERS OF COMMUNITY ENGAGEMENT

This category supports projects and activities that actively engage museums with their community. Public programs, community partnerships with other organizations, and behind-the-scenes activities that enhance the museum's ability to serve their community (including membership, personnel administration, and communications) are eligible for funding.

IMLS sees Museums for America as investments grants, and expects that for institutions that receive them the funding will provide:

- Investment in capacity
- Support for institutional strategic planning
- Support to measure outcomes

Eligible expenses include but are not limited to:

- Staffing
- Costs related to planning and maintenance of project partnerships
- Purchase of equipment, materials, supplies or services
- Staff training
- Program development and implementation
- Exhibition design and fabrication
- Integration of technology into exhibition or educational programs
- Costs associated with evaluation of grant programs or activities
- Research
- Publication
- Indirect or overhead costs

THE PROGRAM PROCESS

- 1) Applicants receive the grant application booklet; they complete the application form.
- 2) IMLS receives the applications and checks them for completeness.
- 3) IMLS identifies a pool of available field reviewers. IMLS will assign three museum professionals to each application.

HOW ARE APPLICATIONS ASSIGNED TO FIELD REVIEW?

- 4) The applications first are sorted into groups by strategic goals (sustaining cultural heritage, supporting lifelong learning, serving as centers of community engagement.) Then the applications are sorted within these groups by request amount (Funding Category 1 Requests between \$5,000-\$24,999; Funding Category 2 Requests between \$25,000-\$74,999; Funding Category 3 Requests between \$75,000-\$150,000). Finally, budget categories are determined within each of these divisions, based on the institutional budget sizes of applications received.

The number of budget categories for each project type and request amount will depend on the number of applicants and the range of their budgets. We may ask you to review a museum with a budget size that is either smaller or larger than those with which you are most experienced; in such case, you should pay close attention to the museum's resources. Each review group may contain applications of many disciplines. You are asked to review them based on their proposed project and its ties to their strategic plan.

5) Field reviewers receive the applications, evaluate them, and return their reviews to IMLS.

WHAT DOES IMLS DO WITH THE FIELD REVIEWS?

6) IMLS processes comments and scores. Reviewers' scores are mathematically standardized to mitigate the effect of those who always use low or high scores. A single standardized score is produced from each reviewer for each application. This score is then used to rank the applications.

HOW DOES IMLS RANK THE APPLICATIONS?

7) Using a generally accepted mathematical formula – standard deviation – IMLS standardizes the scores and all applications. The final standardized scores from the field reviewers for each application are averaged to produce one average standardized score. All applications are ranked based on the standardized average, from highest to lowest. This ranking will be used to determine which applications are sent to the sitting review panel. The panel will make final recommendations based on the field review comments as well as their own expertise.

WHAT IS THE ROLE OF THE MFA SITTING REVIEW PANEL?

8) The MFA Sitting Review Panels meet to provide a second level of review and make final funding recommendations. There will be four panels assembled to evaluate the applications. We will ask the panels to look across the budget categories and make recommendations on the strongest applications, which are those that best serve the museum's strategic plan, are long-term investments in capacity, and have measurable outcomes. The MFA review panels, made up of museum professionals, will meet in Washington, DC in June and July after the field review period. IMLS asks superior past reviewers to serve on the panel. Panelists represent a cross-section of museum disciplines, budget sizes, geographic regions and governing authorities. IMLS will ask panel members about issues pertinent to this year's competition and about improving the MFA program, the application, and the process. IMLS staff provide a list of applications recommended for funding to the Agency Director for his approval.

Questions about any information in this booklet?

Contact the IMLS Program Office at (202) 606-8539 or by e-mail at chenry@imls.gov, rtorio@imls.gov, or kveline@imls.gov between 8:30 a.m. and 5:00 p.m. Eastern time, Monday through Friday.

WHAT HAPPENS BEFORE IMLS MAKES THE AWARDS?

9) IMLS reviews the financial/accounting information and the budget sheets of each potential grantee.

10) IMLS awards the MFA grants. IMLS will make awards taking into account panel recommendations, and distribution of applications by:

- Strategic goal
- Grant request
- Institutional budget category

The Director of IMLS makes the awards and announces them in September. At that time, IMLS notifies all applicants by mail whether or not they have received an award. We also send a list of grantees to all participating reviewers. With their notification, all applicants receive the reviews that their field reviewers and panelists completed. Museum staff can benefit tremendously from your thoughtful, constructive comments.

HOW ARE YOUR REVIEWS USED?

Your scores will determine the ranking of applications—which will go to the sitting panel, and which will not.

For those applications that go to panel review, your reviews will provide the basis for the panel review, guiding panelists to the strong and weak aspects of the application. If a panel-reviewed application is not funded, your review comments, along with those of panelists, will assist the applicant as they consider whether/how to revise their application for resubmission.

For those applications that are not ranked highly enough to go to panel, field review feedback will be the only guide as they consider whether/how to revise their project for resubmission.

Successful applicants point to good scores and positive comments as a stamp of approval for their program proposals. Museum administrators report that receiving IMLS awards enhances fundraising success with private foundations or state and local sources.

Unsuccessful applicants use reviewer comments to improve or change their applications for resubmission.

HOW CAN YOU GET FEEDBACK ON YOUR PERFORMANCE?

Field reviewers will receive information about their performance from IMLS. IMLS will mail you feedback on your performance regarding your strengths and weaknesses as a field reviewer. You will receive this information in October. Upon receiving your evaluation we invite you to call the IMLS Office of Museum Services to discuss your evaluation.

We greatly appreciate the tremendous amount of time and effort you have committed to being a reviewer. By participating in the peer review process, you are making a significant contribution to the Museums for America grant program and are providing an invaluable service to the entire museum community. Thanks!

II. Application Review Instructions

FIRST STEPS

This section of the handbook contains detailed information on how to review a MFA application. If you think that you may not be able to review every proposal you have received, do not begin the review process. Instead contact IMLS at once and notify the appropriate staff contact.

QUALITIES OF A GOOD PROPOSAL

A good MFA proposal should:

- Strengthen the capacity for education and public service
- Advance the institution's strategic agenda
- Be an investment for the future; even if one-time activities they must have long term institutional impact

CHECK SHIPPING BOX

CONFLICTS OF INTEREST

If you haven't already done so, refer to the contents on the Reviewer Checklist. Contact IMLS immediately if any of the items listed are missing.

Read through your list of applications to see if there are any potential conflicts of interest.

You have a conflict if:

- You, your spouse, or minor child are involved with the applicant institution, or in the project described in the application, as a paid consultant or through other financial involvement.
- The application is presented on behalf of an institution with which you, your spouse or minor child are negotiating future employment.
- Through prior association as an employee or officer, you have gained knowledge of the applicant which could preclude objective review of its application. (Past employment does not by itself disqualify you, as long as you can review objectively.)

Other conflicts may arise if you have served as a consultant or member of an accreditation team for an applicant institution or have recently applied for a position at an applicant institution. We rely on you to determine if you can objectively review an application.

Once you have reviewed an application, you should never represent the applicant (concerning the application, or any grant that may result from it) in dealings with the Institute of Museum and Library Services or another federal agency.

CONFIDENTIALITY

The information contained in grant applications is strictly confidential. Do not discuss or reveal names, institutions' project activities, or any other information contained in the applications. Contact IMLS if you have any questions concerning an application – do not contact an applicant directly.

APPLICATION COMPLETENESS

Check your application to make sure that all required information is included. We only check the original copy for completeness. *If any application appears to be incomplete, contact IMLS immediately.*

Questions about any information in this booklet?

Contact the IMLS Program Office at (202) 606-8539 or by e-mail at chenry@imls.gov, rtorio@imls.gov, or kveline@imls.gov between 8:30 a.m. and 5:00 p.m. Eastern time, Monday through Friday.

III. Evaluating Applications

IMLS asks you to express your professional judgment of each proposal in the following three ways:

- (1) Assess if the proposal addresses the stated evaluation criteria;
- (2) Write comments for each criterion;
- (3) Assign a numerical score to each criterion. Note that comments that support your scores are *required*. Your judgment should reflect how well you think the information provided in each proposal addresses the goals stated for criteria in MFA.

READ AND POST EVALUATION CRITERIA

Please use the MFA Evaluation Criteria poster as a reference. Listed below are the seven narrative questions and review criteria.

1. PROJECT DESIGN

The applicant will describe the project and its overall goals.

Review Criteria: Extent to which the project proposes efficient, effective, and successful approaches to accomplish clear goals and objectives. If technology purchase is requested, extent to which it will support the project or activity goals, and further the institution's strategic plan. If partnerships are supported by the grant, evidence that all partners are active contributors to and beneficiaries of the partnership activities.

2. GRANT PROGRAM GOALS

The applicant will describe which one of the three goals of Museums for America the project addresses:

- Sustaining cultural heritage
- Supporting lifelong learning
- Serving as centers of community engagement

Describe how your proposal fits into that category. The applicant chooses *only one* category to address. Do not be more favorable if the applicant tries to address all three categories. While many projects fit into one or more of these broad categories, every project will emphasize one of these areas over the others.

Review Criteria: Degree to which the project or program addresses the programmatic strategic goal the institution has identified on the face sheet as its chosen category.

3. HOW THE PROJECT FITS INTO STRATEGIC PLAN AND MISSION

How is the proposal related to the applicant's mission statement and strategic plan? A two-page summary is a required part of the application. The applicant will describe how the project will serve as an investment in institutional capacity and the long-term impact of this project after IMLS funding ends.

Review Criteria: Evidence that the project or activities fit into and further the institution's strategic plan and mission. Extent to which the project is of sufficient scope to effect systemic change within the organization and/or expand institutional capacity to carry out the above strategic goals.

4. STRATEGIC PLAN: PROCESS AND FINANCIAL RESOURCES

The applicant will describe briefly how the institution arrived at its strategic plan, including the planning process and the participants in that process. Describe how the institution's financial resources support its strategic plan and the long-term stability of the museum.

Review Criteria: Evidence that the museum's strategic (institutional, long-range, master) plan had community, board, and staff involvement and supports the goals and needs of both the museum and its community. The applicant will show evidence that the planning activities of the museum will ensure the long-term financial stability of the museum.

(Please note: a required attachment is a financial statement for the applicant's two previous fiscal years prior to application.)

5. APPROPRIATENESS OF PROJECT FOR INSTITUTION, AUDIENCE

The applicant will describe who the intended audience is for this proposal and how the project will serve this audience. Briefly describe your area's demographics and how this intended audience fits within the institutional strategic plan.

Review Criteria: Evidence that the project designers have identified an audience, performed a formal or informal assessment of their needs, and have designed this project as the best solution to answer those needs.

6. PROJECT RESOURCES: TIME AND BUDGET

The applicant will describe the specifics of the time allotted for major activities and how these activities fit within the overall activities of the museum. Discuss the budget allocated to accomplishing the proposed activities.

Review Criteria: Evidence that the project activities will be effectively completed and that the applicant institution is capable of carrying out the project to its successful conclusion through the deployment and management of resources including money, facilities, equipment, and supplies. Appropriateness and cost efficiency of budget to complete project activities.

7. PROJECT RESOURCES: PERSONNEL AND TECHNOLOGY

The applicant will describe personnel who will accomplish the proposal goals. Briefly describe their qualifications and how they will be able to accomplish the necessary tasks for the project, especially if they are current museum staff with other duties. If hiring new personnel, describe the position in detail and the qualifications of appropriate candidates. If the project includes digitization of museum collections, use the completed “Specifications for Projects Involving Digitization” as a reference.

Review Criteria: Evidence that the project personnel are qualified to accomplish project goals and activities. To what extent can personnel commit adequate time to manage and implement the project activities? Extent to which personnel demonstrate appropriate experience and expertise in the specific area the project addresses. If project includes digitization, evidence that appropriate procedures will be followed.

READ APPLICATIONS

Read your applications to develop a feel for a range of responses. Take notes as you read.

ADDRESS FUNDING PRIORITIES

For MFA, IMLS is looking for projects that support the mission statement and strategic plan, and are investment grants, not one-time activities with no long term institutional impact. As a reviewer, you are reviewing how well designed the project is, how well the application will address its stated goals, and how the proposal addresses the funding priorities while keeping in mind the given resources of the institution.

THE ONLINE REVIEW PROCESS

All reviewers will use the online review process. It is easy to do. All you need is internet access. There are no review sheets to type up on a typewriter or handwrite, or hard-to-read computer diskettes, or sheets that you have to reformat on your personal computer. Further, you don't have to fax your reviews to us and when completed we can print out a nice clean copy to forward to our panelists. Just follow these steps:

Your login is: your e-mail address that is on file with IMLS
Your password is: password

When you log in and create your user account, you will need to create a new password.

The instructions for creating and submitting your reviews will be at your fingertips. When you visit the site, there is a hotlink for technical questions. These questions will be sent directly to our computer technicians that are working with us to design this system. If you have other questions about reviewing, please contact the program office at (202) 606-8539.

When you have completed assigning scores and giving comments for each application assigned to you, you will submit the entire review to IMLS. Then, please remember to print a copy of each completed review to keep for your files.

GOOD COMMENTS

Some of the characteristics of good comments are:

- Presented in a constructive manner
- Concise, specific, easy to read and understand
- Specific to the individual applicant
- Correlate with the score that is given
- Acknowledge the resources of the institution
- Reflect the application's strengths and identifies areas for improvement
- Directed to applicants for their use

Remember, both successful and unsuccessful applicants use your comments to improve their institutions and future applications. Each of the sample comments listed below is followed by an explanation of its good characteristics.

Criteria 3 How the project fits into strategic plan and mission: "This project goes hand-in-hand with the museum's strategic plan and mission statement. This project will directly go to improving the membership base and provide better access to the community." (Provides a good explanation of how this project fits into the strategic plan)

Criteria 6 Project – Resources: Time & Budget: "The Budget is realistic for the numbers of participants, and for the compensation of consultants and the number of hours for their assistance for this project." (Provides specific information)

Additional Comments: "Addresses an area of critical concern for your museum, but a major barrier exists: More evidence of institutional support is required – their commitment is not clear in this application." (Identifies strengths and areas for improvements)

POOR COMMENTS

Listed below are sample "poor" comments. Comments that are poor are considered vague, irrelevant, insensitive, or unclear. These comments actually hinder the evaluation process rather than help it. They are not helpful to either panelists or applicants.

To avoid making poor comments, DO NOT:

- Penalize an applicant because you feel the institution doesn't need the money, remember any eligible institution may receive MFA funds, regardless of need.
- Penalize an applicant because of missing materials. If you are missing required materials, please contact IMLS *immediately*.
- Make derogatory remarks – offer suggestions for improvement rather harsh criticism.
- Question an applicant's honesty or integrity. You may question the accuracy of information provided by the applicant, but if you are unsure how to raise your question, contact IMLS.
- Offer or ask for irrelevant or extraneous information – your comments should concern only the information IMLS requests of applicants.

Each of the sample poor comments listed below is followed by an explanation of why it is a poor comment.

Questions about any information in this booklet?

Contact the IMLS Program Office at (202) 606-8539 or by e-mail at chenry@imls.gov, rtorio@imls.gov, or kveline@imls.gov between 8:30 a.m. and 5:00 p.m. Eastern time, Monday through Friday.

Strategic plan – Mission and Finances:

“Good job – the project follows a plan.” (Vague)

Project – Design:

“The project uses technology.” (Vague)

Personnel:

“The project personnel seem to be well qualified, but this institution does not have a good reputation.” (Insensitive and irrelevant)

Project – Resources: Time & Budget:

“I might question some parts of the budget, but they probably know what they are doing.” (Vague, not evaluative, and irrelevant)

Project – How the Project fits into Strategic Plan and Mission:

This is clearly not the highest priority that the museum should identify. They should be focusing on educational outreach and not collections management.” (Not the reviewer’s job to determine the museum’s priorities)

IV. Assigning Scores

After you have written comments for each applicant criterion, you will assign a score. To help applicants understand and benefit from your reviews, make sure that your scores accurately reflect your written comments. If you have any questions, contact IMLS.

Read the MFA Scoring Definitions below for a description for each of each of the seven scores. Assign a score from 1 to 7 to each of the seven project criteria. Assign a score that correlates with your comments and is, in your judgment, appropriate

1. Applicant's response demonstrates an unsatisfactory discussion of this criterion and does not address their strategic goals and/or present a sustainable solution.
2. Applicant's response demonstrates some effort to discuss this criterion, but indicates a need for considerable improvement in addressing their strategic goals and/or presenting a sustainable solution.
3. Applicant's response demonstrates a considerable effort to discuss the criterion, but indicates the need for some improvement in addressing their strategic goals and/or presenting a sustainable solution.
4. Applicant's response meets this criterion, but does not indicate any additional merit.
5. Applicant's response meets this criterion and indicates additional merit in meeting their strategic goals in a sustainable way.
6. Applicant's response exceeds this criterion and indicates considerable additional merit in meeting their strategic goals in a sustainable way.
7. Applicant's response is exceptional for this criterion, and demonstrates a model for meeting their strategic goals in a sustainable way.

IMPORTANT

- Assign only whole numbers to each of the seven narrative responses.
- Do not use fractions, decimals, zeros or more than one number in scoring individual sections.
- Score all responses; do not leave any blank

Questions about any information in this booklet?

Contact the IMLS Program Office at (202) 606-8539 or by e-mail at chenry@imls.gov, rtorio@imls.gov, or kveline@imls.gov between 8:30 a.m. and 5:00 p.m. Eastern time, Monday through Friday.

V. Reviewer Material

**SIGN
REVIEWER
CONTRACT**

Sign your reviewer contract and fax to IMLS along with your completed ACH form and reviewer questionnaire.

**RETURN
MATERIALS
TO IMLS**

You must fax back the enclosed Automated Clearing House (ACH) form and reviewer contract for your services. Honoraria is paid electronically and the ACH form must be completed in its entirety, even if submitted in a prior year with the identical banking information.

In addition to your ACH form and reviewer contract, please fax us your completed reviewer evaluation.

Please fax to: 202/606-0010

Should you decide to use a private carrier rather than fax your reviewer contract, ACH form, and questionnaire, please send to the following address:

IMLS
Office of Museum Services
1100 Pennsylvania Avenue, NW
Room 609
Washington, DC 20506
Attention: MFA Reviewer Information

Please do not send this material via the USPS as we are still experiencing lengthy mail delays.

If you fax your materials then you DO NOT need to send us your originals.

- MEET THE IMLS REVIEW DEADLINE! April 16, 2004
- Don't forget to fill out your reviewer questionnaire (you may send it a few days later if you wish); it's your chance to let us know what you think about your review experience.

**KEEP
COPIES
UNTIL
OCTOBER 1**

14) Keep your applications and a copy of your review sheets until October 1, 2004 (in case of questions from IMLS staff).

- Maintain confidentiality of all applications that you review.
- After October 1, 2004, destroy the applications (you may keep optional attachments such as catalogs or brochures).

Thank You for Serving as a MFA Field Reviewer!

VII. FAQs

1. How should I assign scores?

Scores should be assigned for all of the 7 narrative questions, based on the scale of 1-7 discussed on page of this booklet.

2. Should new projects be considered more competitive than existing ones?

No, a museum does not have to create a new project in order to meet its strategic goals. But often, in order to meet those goals an ongoing project will have an aspect of expansion or a new twist.

3. Can a proposed project use its staff as its target audience?

Yes, the staff is a reasonable target audience, when a project is a behind-the-scenes or infrastructure project that ultimately helps museum staff serve their public better.

4. What should I do if I discover something missing in the application? Or if the applicant did not complete all parts of the application?

Call IMLS immediately! IMLS only checks the original copy of the application for completeness. IMLS may be able to send you the missing materials.

5. Should the size or age of the institution be considered when evaluating their application?

No, these are not review criteria. The institution should be evaluated based on their stated strategic plan.

6. To whom should the review comments be addressed?

Please address all comments to the applicant. While IMLS staff and panelists do read the comments, it is important to address the comments to the applicant so that they may use them most constructively for their project.

7. What should I do if I find that I know someone mentioned in the application?

Call IMLS immediately and discuss the possibility of a conflict of interest. Not all cases are conflicts, but please call to discuss your situation.

8. Must I make comments for every question?

Yes, you must make a constructive and substantive comment for every question. This is the best way to help an applicant improve all aspects of their project.

9. Should proposals with evaluation components be considered more competitive?

No, IMLS will assist all funded applicants with creating an outcomes-based evaluation plan for at least one aspect of their project. At this time, there is no requirement for an evaluation plan to be developed at the time of application.

10. How do I consider a proposal from an institution that has a different discipline than my own?

You are evaluating the proposals based on their merit in your specific area of museum expertise, whether it is administration, education, community outreach or curation. Please evaluate the application based on the soundness of the project ideas, and its ties to the IMLS strategic goals and the institution's strategic plan.

11. What are indirect costs rates, and why do some institutions have such a high rate?

Indirect cost rates are negotiated rates for institutions to charge overhead costs when completing a project. Some institutions, such as universities have very high rates because of all the infrastructure involved in carrying out a project within that institution. Also, an institution may have a high rate if they are in a very isolated geographic area, making it more expensive to carry on daily activities such as an institution in Hawai'i. Please do not allow these rates to bias your reviews.

Questions about any information in this booklet?

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12. What should I do if the institution does not have a formal strategic plan?

Strategic plans come in many forms. Please put the plan provided by the applicant in context of their planning process and their community.

13. Can institutions create their own forms for the budget and face sheet?

Yes, this is acceptable. As long as an institution includes all the information that IMLS requests, the forms can be recreated.

14. Can a project be just for planning?

Yes, planning projects are eligible. A museum must justify how this planning helps them reach their stated institutional goals.

15. How was I selected to review these applications?

You were selected to review your particular group of applications based on the museum professional skills you indicated on your IMLS reviewer update and also based on your choice of institutional budget size.

16. Is there any part of the application that carries more weight than another?

No, all sections of the application have equal weight. Each score is important in determining the overall strengths and weaknesses of a proposal.